CMS Net

Follow Up Module

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Follow Up Module

Follow Up Module

The Follow Up Module was designed to provide users with an automated mechanism to notify another county user an action is required on a client's record. The Follow-Up Module encompasses creating requests for follow-up, posting follow up responses, posting pending follow up notifications and displaying historical follow up completed requests.

This module will allow users to search, post, edit, delete, transfer and track a follow up notification on any record for their county. Users will only be able to see and work with follow ups assigned to them. In addition, this will allow a single requestor to post the same notification for multiple users.

Follow Up Module is Broken Down into Four Parts: Follow Up Module is broken down into four parts:

- Edit Follow Up Requests and Responses
- Enter New Follow Up Requests
- Follow Up History
- Respond to Follow Up Requests

Manual

To better understand the Follow Up Module, this manual consists of five sections:

Sections:

Section 1: Enter New Follow Up Request

Section 2: Respond to Follow Up Requests Section 3: Edit Follow Up Requests and Responses: As Requestor

Section 5: Follow Up History

Common Keys & Functions The following is a chart displaying the common keys and functions.

Section 4: Edit Follow Up Requests and Responses: As Responder

Key(s)	Functions
Down arrow / Up arrow	Moves cursor to next / previous field
Action Menu Key	
(PC = F2, T = F11)	Allows user to save or cancel entries
Help Key	
(PC = F1, T = F13)	Gives help message or pick list.
Cancel Key	
(PC = Shift F2, T = F12)	Allows the user to cancel entry from any screen.

Section 1: Enter New Follow Up Request

Enter New Follow Up Request To create a follow up request to notify users that a follow up action requirement has been place on a client's record; users must first create a request under the *Enter New Follow Up Request*.

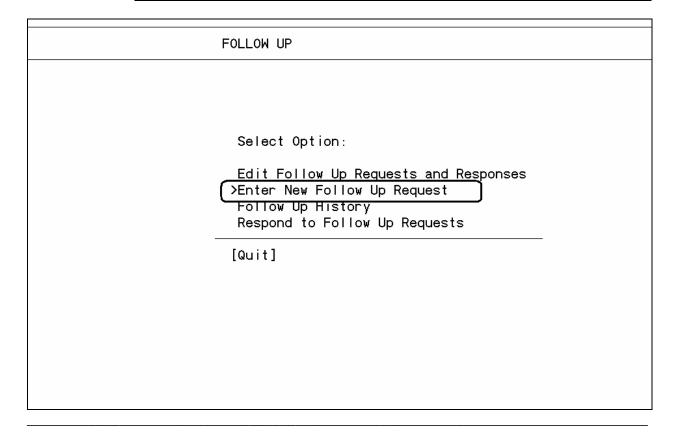
To Access Follow Up

Step	Action
1	Type "F" for Follow Up from the Primary Option
2	Press <enter></enter>

PRIMARY OPTION	
Select Option:	
CHANGE ACCESS CODE	
DISPLAY ELIGIBILITY LOG	
ELECTRONIC POST-IT NOTE	
ELIGIBILITY	
EVENT TRACKING	
>FOLLOW UP	
GENERATE REQUESTS/AUTHORIZATIONS	
MailMan Menu	
MEDICAL THERAPY PROGRAM	
REGISTRATION	
SYSTEM MAINTENANCE	
[Quit]	
<u> </u>	

To Enter New Follow Up Request

Step Action	
3	Type "EN" for Enter New Follow Up Request
4	Press <enter></enter>



Identify Patient After pressing <Enter>, the Patient Identification Screen, CMSPI-10 appears:

Select Pa	t ient :
() PIE,CHERRY CCS#: 3860903 CIN: 37431741A 4 Reg=ACT Med=E F/R=E Pgrm End Dt:	Gender: F DOB: 03/01/2002 Legal County: SACRAMENTO CCS Elig Stat: 9K CCS
[Quit]	
CCS Number:	
Pt Name: PIE, CHERRY	Birthdate:
Current Legal County:	Gender :
Client Index Number:	
Social Security Number:	

For instructions on identifying patient, see the Patient ID section of this manual.

Follow Up After identifying a patient, the Follow Up Request Screen appears: **Request Screen**

CMSAT	FOLLOW UP REQUEST	CMSFU-10
Pt Nm: PIE,CHERRY Gender: F DOB: 03/01/2002	CCS#: 3860 LgI Co: SACRAMENTO REG= ACTIVE	903 CIN: 37431741A 4 MED= E F/R= E
Request Date: 03/01/2007 Requestor: FOLLOW UP,USER Action Required By:	Follow Up ID: 0307-000018 St ONE Priority: ROUTINE	atus: PENDING
Primary Addressee: BEF Patient Contact Phone: (91 Provider:	RRY AND COCO PIE 16) 999-9999 Other Phone: Telephone:	
Subject: Comments:		
Request Follow Up to:		
Notification to:		
Last Update By:	Dat	e:

Field Descriptions The following table describes data entry fields on the Follow Up Request Screen.

Element Name	Descriptions/Comments	
Patient Header	Defaulted from Patient Registration Face Sheet	
Request Date	Defaults to today's date. Auto-populate date.	
Follow Up ID	Auto-populates number. Number derived by: Month, Year – auto-calculate six digit number MMYY-999999	
Status	 The status of the follow up request: Pending, Complete, No Action. Default to pending. The request status will default to No Action if the patient's record is closed, denied or not opened. If status is changed to Complete the follow up will display on the Follow Up History screen. Cannot select Complete status unless all Action Taken Dt fields are complete on the Follow Up Response Screen. If a record has a pending request and consequently closes, denies or becomes not open status all pending requests will be posted to history with No Action status. 	
Requestor	The user generating the request. Default to user logged in	
Action Reqd by	The date the request should be acted on by. This date must be completed by the requestor. Date cannot be past date or before the request date.	
Priority	The priority of the request and will default to Routine. Acceptable values can be Routine or Urgent.	
Primary Addressee	Defaults from the Patient Registration table	
Patient Contact Phone	Patient's Contact Phone Number. Display data from the Primary Phone Number field listed in Patient Registration Face Sheet.	
Other Phone	Patient's Other Phone Number	
Provider	Provider Associated to the patient. Select from pick list, <f1> or by typing in the last name, first name of provider. No spaces. Maximum of one provider</f1>	
Telephone	Provider Telephone number. Auto display if provider is picked.	
Subject	A brief free form text description required for follow up request and automatically saves as a General Topic for Follow Up.	
Comments	The full free text description of the requirement on the record. Automatically saves to narrative for Follow Up.	

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Request Follow Up to	 The individual required to take action on the request. Select from pick list, <f1> or by typing in the last name, first name of user. No spaces. Most list a minimum of one (1).</f1> Requestor can delete individuals or add individuals at any point if that individual has not taken action on request. If added or deleted, the associated notification will be added or deleted in Follow Up Response Screen, Follow Up Requests Screen and Follow Up History Screen. 	
Notification to	The individual to be notified of the pending action. Select from pick list, <f1> or by typing in the last name, first name of user. No spaces.</f1>	
Last Updated by	Defaults to user's name that last updated record	
Date	Date is populated after the request has been saved. The system will update the date to reflect today's dates if the record has been changed. Format: MM/DD/YYYY.	

Add New User to the Request Follow Up to Field

Step	Action
1	Arrow down to the Request Follow Up to Field
2	Use <f1></f1> or type last name and first name of user
3	Press <enter></enter>
4	To add more users' name, repeat step 2 and step 3
5	When done press <enter> to move to the next field</enter>

FOLLOW UP, USER FIVE FOLLOW UP, USER FOUR FOLLOW UP, USER ONE FOLLOW UP, USER THREE FOLLOW UP, USER TWO [Quit] CCS#: 3860903 CIN: 37431741A 4 Lgl Co: SACRAMENTO REG= ACTIVE MED= E F/R= E FOLLOW UP, USER TWO ONE [Quit] CCS#: 3860903 CIN: 37431741A 4 Lgl Co: SACRAMENTO REG= ACTIVE MED= E F/R= E FOLLOW UP, USER TWO ONE [Quit]			
FOLLOW UP, USER ONE FOLLOW UP, USER THREE FOLLOW UP, USER TWO FOLLOW UP, USER TWO FOLLOW UP ID: 0307-000019 Status: PENDING ONE			
FOLLOW UP, USER THREE FOLLOW UP, USER TWO FOLLOW Up ID: 0307-000019 Status: PENDING ONE			
FOLLOW UP, USER TWO Follow Up ID: 0307-000019 Status: PENDING ONE			
Primary Addressee: BERRY AND COCO PIE			
Patient Contact Rhone: (916) 999-9999 Other Phone:			
Provider: Telephone:			
Subject: SCHEDULE RPPT			
Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR			
2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE			
BERRY PIE DOES NOT SPEAK ENGLISH.			
Request Follow Up to:\FOLLOW UP,USER THREE foll			
Notification to:			
Last Update By: Date:			

Add New User to Notification to Field

Step	Action
1	Arrow down to the Notification to Field
2	Use <f1></f1> or type last name and first name of user
3	Press <enter></enter>
4	To add more users' name, repeat step 2 and step 3
5	When done press <enter></enter>

Select One:	FOLLOW UP REQUEST	CMSFU-10		
FOLLOW UP, USER FIVE >FOLLOW UP, USER FOUR	CCS#: 3860903 CIN: 374	31741A 4		
FOLLOW UP, USER ONE	Lgl Co: SACRAMENTO REG= ACTIVE MED= E			
FOLLOW UP, USER THREE				
FOLLOW UP,USER TWO	Follow Up ID: 0307-000019 Status: PENDIN -ONE	G		
[Quit]	/2007 Priority: ROUTINE			
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 Other Phone: Provider: Telephone:				
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.				
Request Follow Up to: FOLLOW UP,USER THREE FOLLOW UP,USER TWO				
Notification to FOLLOW UP, USER FIVE				
Last Update By:	Date:			

Action Menu When new request is completed, <F2> to bring up action menu.

The Enter New Follow Up Request have five commands:

Se	lect One:	
()	Save	
()	Delete	
()	Print	
()	Cancel	
[Quit]		

Command	Action
Save	Select <i>Save</i> from action menu to save data entered.
	Save will save the record and bring user to the Follow Up Request Branch
	Menu.
Print	Select <i>Print</i> will take user to the <i>Print Device</i> page to print. <i>Print</i> will bring
	user to the print device page for printing.
Cancel	Select Cancel will take user back to previous page. Cancel will not save the
	request but bring user back to the Follow Up Menu.
Quit	Select Quit will take user back to screen. Quit will bring user back to the
	Follow Up Request screen to continue with data entry.

Branch Menu

The system shall send user to the Follow Up Request Branch Menu under the following condition:

- Save is selected from Action Menu
- Print is selected from Action Menu

	FOLLOW UP REQUEST BRANCH MENU	
Pt Nm: PIE,CHERRY	CCS#: 3860903 CIN: 3	
Gender: F DOB: 03/01/2002	_GL_CO: SACRAMENTO REG= ACTIVE	F/R= E
	(?) Narrative for Follow Up Request	
	() Mail Message for Follow Up Request () Follow Up Menu	
	() For row op Pieria	

Section 2: Respond to Follow Up Requests

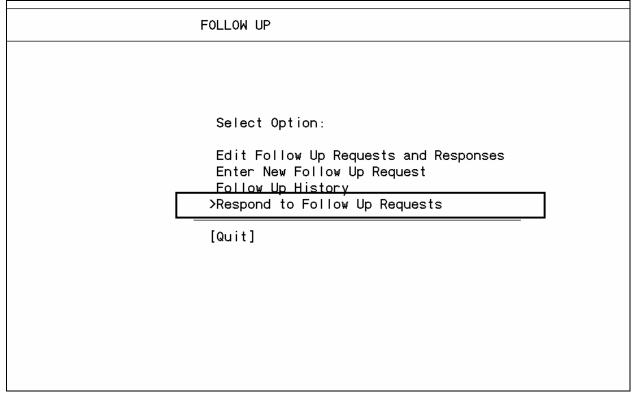
Respond to Follow Up Requests The *Respond to Follow Up Requests* display all requests sent to user to take action and also allow user to post response to the request records.

As the Responder

Under the *Respond to Follow Up Requests*, user can only respond to pending request. Any request that user had previously responded to will be found under the *Edit Follow Up Requests and Responses*.

To Access Respond to Follow Up Requests

Step	Action
3	Type "R" for Respond to Follow Up Requests
4	Press <enter></enter>



.....

After pressing <Enter>, the Respond to Follow Up Requests Select Option appears.

To Respond to Follow Up Requests by Patient If you know the client's name, you can respond to a follow up request by client search.

Step	Action
1	Select "Patient" from Respond to Follow Up Requests
2	Press <enter></enter>

Respond to Follow Up Requests

SELECT OPTION

>PATIENT

ACTION REQD BY DT AS RESPONDER REQUEST FROM QUIT **Identify Patient** After pressing <Enter>, the Patient Identification Screen, CMSPI-10 appears:

PATIENT IDENTIFICATION FOR: Respond to Follow Up Requests		
Enter one of the following identifiers:		
CCS Number:		
Pt Name: PIE,CHERRY	Birthdate:	
Current Legal County:	Gender:	
Client Index Number:		
Social Security Number:		

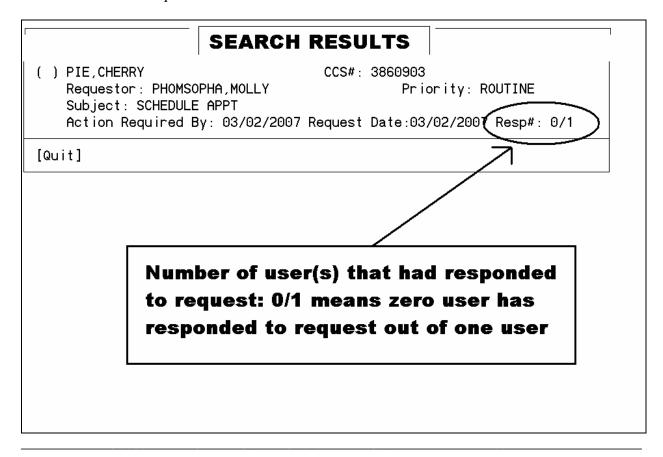
For instructions on identifying patient, see the Patient ID section of this manual.

() PIE,CHERRY Requestor: PHOMSOPHA,MOLLY Subject: SCHEDULE APPT Action Required By: 03/02/2007	3860903 Priority: ROUTINE Date:03/02/2007 Resp#:	0/1
[Quit]		

After identifying a patient, system will display all results by selected client.

Search Results Explanation

The "*Resp#:*" field is the total # of users that have responded to requests. For example: Resp#: 3/4 means that three out of four users had responded to the request.



Follow Up Select record, Follow Up Response Screen appears: **Response Screen**

Follow Up Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATH BERRY PIE DOES NOT SPEAK ENGLISH. [Quit]		37431741A 4 E F/R= E NDING
Primary Addressee: BERRY AND COCO PIE Patient Contact Phone: (916) 999-9999 0 Provider: Data entry fields	This messa requestor, comments.	•
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. B 2PM TO 4PM. ALSO ASK TO SPEAK W BERRY PIE DOES NOT SPEAK ENGLIS	ITH FATHER (COCO PIE) E	
Follow Up By: FOLLOW UP,USER TWO	Action Taken Dt: (
Notification to: Last Update By: FOLLOW UP,USER ONE	Accepted Dt: Carte: 03/	

Follow Up Response Screen

Field Description

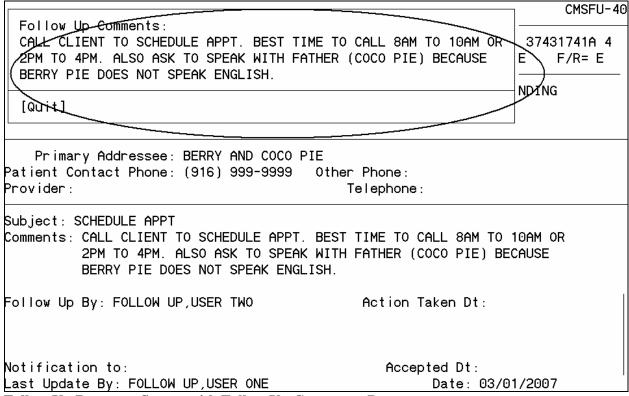
Element Name	Descriptions/Comments	
Patient Header	Defaulted from Request Follow Up screen	
Request Date	Defaults to today's date. Auto-populate date.	
Follow Up ID	Auto-populates number. Number derived by: Month, Year – auto-calculate six digit number MMYY-999999	
Follow Up Status	 The status of the follow up request: Pending, Complete, No Action. Default to pending. The request status will default to No Action if the patient's record is closed, denied or not opened. If status is changed to <i>Complete</i> the follow up will display on the Follow Up History screen. Cannot select <i>Complete</i> status unless all Action Taken Dt fields are complete on the Follow Up Response Screen. If a record has a pending request and consequently closes, denies or becomes not open status all pending requests will be posted to history with No Action 	
Requestor	Status. The user generating the request. Default to user logged in.	
Action Reqd by	The date the request should be acted on by. This date must be completed by the requestor. Date cannot be past date or before the request date.	
Priority	The priority of the request and will default to Routine. Acceptable values can be Routine or Urgent.	
Request Follow Up to	The individual required to take action on the request. Select from pick list, <f1> or by typing in the last name, first name of user. No spaces. Must list a minimum of one (1). • Requestor can delete individuals or add individuals at any point if that individual has not taken action on request. If added or deleted, the associated notification will be added or deleted in Follow Up Response Screen, Follow Up Requests Screen and Follow Up History Screen.</f1>	
Primary Addressee	Primary address of client. Defaulted from Request Follow Up screen.	
Patient Contact Phone	Patient's Contact Phone Number. Display data from the Primary Phone Number field listed in Patient Registration Face Sheet. Defaulted from Request Follow Up screen	
Other Phone	Patient's Other Phone Number. Defaulted from Request Follow Up screen	

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Provider	Provider Associated to the patient. Select from pick list, <f1> or by typing in the last name, first name of provider. No spaces. Maximum of one provider.</f1>
Telephone	Provider Telephone number. Auto display if provider is picked.
Subject	A brief free form text description required for follow up request and automatically saves as a General Topic for Follow Up.
Comments	The full free text description of the requirement on the record. Automatically saves to narrative for Follow Up.
Follow Up by	List individual taking action on the request and default names from Request Follow Up to field.
Action Taken Dt	Date that user took action on request. Fill in the action taken date when done with request to send request to Edit Follow Up Requests and Responses. If not done with request, leave the field blank.
Follow Up Response	The follow up Response taken on a case. This is a free text field and automatically saves to narrative for Follow Up.
Notification To	Only serves as a notification. The only action required, is the entry of the Notification Date indicating user are aware of the request.
Notification Date	Populated by the user listed in the Notification to field when they have viewed the necessary follow up actions required.

Follow Up Comments Box

Follow Up Response screen display after client selection and at the same time the original follow up request, Follow Up Comments box, will auto display on screen for viewing. Press <Enter> to get rid of comment box and take action on request.



Follow Up Response Screen with Follow Up Comments Box

Data Entry as the Follow Up By User Once comments box disappear, system will take user to *Follow Up By* field, at this point user can enter date in *Action Taken Dt* field and post comments to request under the *Follow Up By* field.

CMSAT F	FOLLOW UP RESPONSE	Sele	ect One:
Pt Nm: PIE,CHERRY Gender: F DOB: 03/01/2002 L	CCS#: _g Co: SACRAMENTO REG= ACT	386090 () F	
Request Date: 03/01/2007 F Requestor: FOLLOW UP,USER (Action Required By: 03/02/2		Stat [Quit	:1
Primary Addressee: BERF Patient Contact Phone: (916 Provider:		ields:	
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO RIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH FOILOW Up By: FOLLOW UP, USER THREE Action Taken Dt: 03/01/2007 CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR INTERVIEW ON 4/5/07.			
Notification to: Last Update By: FOLLOW UP,U		pted Dt: Date: 03/01/	/2007

Note

If action on request is not complete and user would like to return to request at a later time to finish, leave the *Action Taken Dt* field blank.

Notification To User

If request was sent to user as the *Notification to* person, user can only enter in the accepted date, which is date that he/she accepted the request.

Data Entry as the Notification To User Once comment box disappear, system will take user to *Notification to* field, at this point user can enter in the accepted date in the *Accepted Dt* field.

CMSAT FO	OLLOW UP RESPONSE	Select One:
Pt Nm: PIE,CHERRY Gender: F DOB: 03/01/2002 Lç		(?) Save 386090 () Print IVE () Cancel
Request Date: 03/01/2007 Fo Requestor: FOLLOW UP,USER ON Action Required By: 03/02/20	NE ,	Stat [Quit]
Primary Addressee: BERR' Patient Contact Phone: (916 Provider:		
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCH 2PM TO 4PM. ALSO A BERRY PIE DOES NOT	ASK TO SPEAK WITH FATHER (Ò	
Follow Up By: Notification to: FOLLOW UP,U		Taken Dt: pted Dt: 03/02/2007
_ast Update By: PHOMSOPHA,MC		Date: 03/02/2007

To Respond to Follow Up Request: Action Reqd by DtUser can also respond to follow up request by action required by date.

Step	Action
1	Type "R" for Respond to Follow Up Requests from Follow Up
2	Press <enter></enter>

FOLLOW UP
Select Option: Edit Follow Up Requests and Responses Enter New Follow Up Request Follow Up History >Respond to Follow Up Requests [Quit]

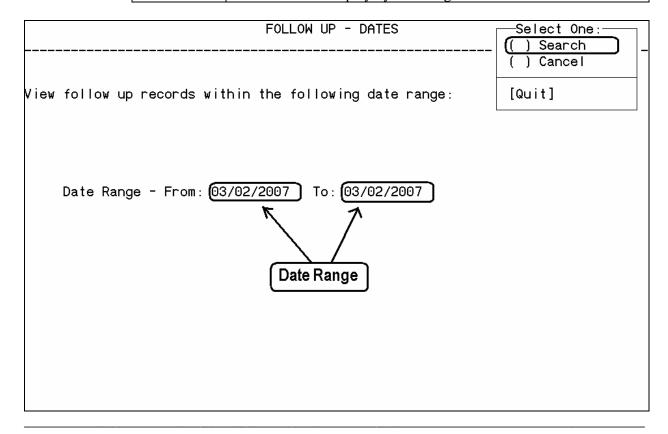
Step	Action
3	Type "AC" for Action Reqd by Dt.
4	Press <enter></enter>

Respond to Follow Up Requests	
SELECT OPTION	
PATIENT >ACTION REQD BY DT AS RESPONDER REQUEST FROM QUIT	

Follow Up-Dates Screen

After pressing <Enter>, the Follow Up- Dates Screen will appear:

Step	Action
1	Enter the date range "From" and "To" date.
2	Press <enter></enter>
3	Select "Search" from the Action Menu
4	Search Results display by date range



Step	Action
4	Select Client's Record
5	Press <enter></enter>

Respond to Follow Up Requests	-50
() LIBRE,NACHO CCS#: 3860902	
Requestor: PHOMSOPHA,MOLLY Priority: ROUTINE	
Sub_iect SCHEDULE_APPT	
Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 0/1	
() LIBRE, NACHO CCS#: 3860902	
Requestor: PHOMSOPHA,MOLLY Priority: ROUTINE	
Subject: SS# MATCH WITH ANOTHER CLIENT	
Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 0/1	
[Quit]	
DEGUEOT EDOM	
REQUEST FROM	
QUIT	

After pressing <Enter>, the Follow Up Response screen appears for user to take action.

Follow Up Comments:

CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.

37431741A 4 E F/R= E

CMSFU-40

NDING

[Quit]

Primary Addressee: BERRY AND COCO PIE

Patient Contact Phone: (916) 999-9999 Other Phone: Provider: Telephone:

Subject: SCHEDULE APPT

Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR

2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE

BERRY PIE DOES NOT SPEAK ENGLISH.

Follow Up By: FOLLOW UP, USER TWO

Action Taken Dt:

Notification to:

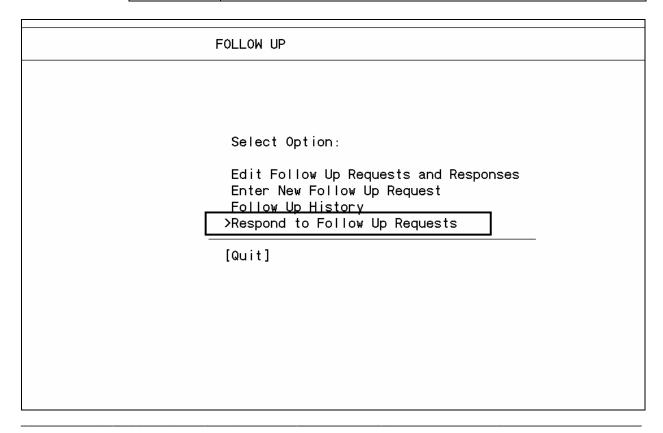
Last Update By: FOLLOW UP,USER ONE

Accepted Dt:

Date: 03/01/2007

To Respond to Follow Up Request: As Responder User can also respond to follow up request by "As Responder". The "As Responder" option is use to search for pending request sent to the user to take action as the requestor.

Step	Action
1	Type "R" for Respond to Follow Up Requests
2	Press <enter></enter>



Step	Action
3	Type "AS" for As Responder
4	Press <enter></enter>

Respond to Follow Up Requests

SELECT OPTION

PATIENT
ACTION REQD BY DT

>AS RESPONDER

REQUEST FROM
QUIT

After selecting "As Responder" the search result displays all requests that user needs to respond to.

Respond to Follow Up Requests

() PIE,CHERRY

CCS#: 3860903

Requestor: FOLLOW UP,USER ONE
Subject: CALL CLIENT TO SCHEDULE APPT
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 0/2

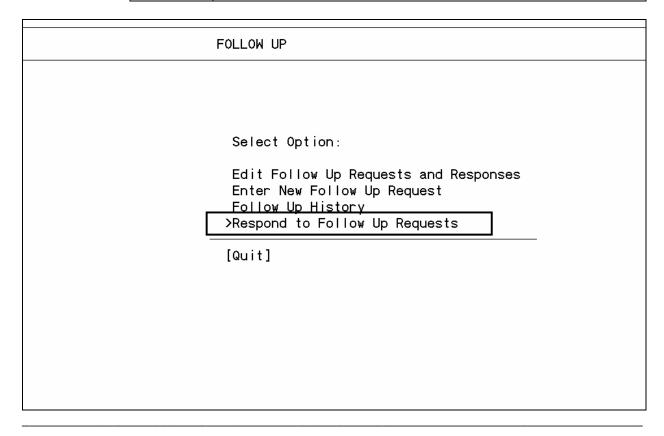
[Quit]

PATIENT
ACTION REQD BY DT
*AS RESPONDER
REQUEST FROM
QUIT

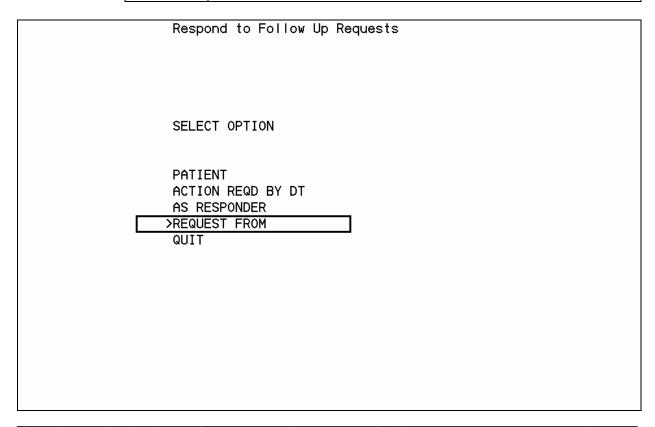
To Respond to Follow Up Request: Request From

User can also respond to follow up request by "Request From". The "Request From" option is use to search for pending requests by user's name that generated the request.

Step	Action
1	Type "R" for Respond to Follow Up Requests
2	Press <enter></enter>



Step	Action
3	Type "R" for Request From
4	Press <enter></enter>



User Identification Screen After pressing <Enter>, the User Identification Screen appears:

Step	Action
1	In the name field, enter the user's last name and first name
2	Press <enter></enter>
3	Action menu displays.
4	Select "Search".
5	Press <enter></enter>

CMSAT	USER IDENTIFI	CATION	—Select One:———6 (?) Search () Cancel
Enter one or more of th	e following iden	ntifiers:	[Quit]
Name: FOLLOW UP, USER		User Stat	us:
County:			
Regional Office:			
Security Group:			
Unique Id:			

The system will pull all follow up request records sent to user by the selected user.

Step	Action
6	Select Record
7	Press <enter></enter>

Respond to Follow Up Requests	U-50
(?) LIBRE NACHO CCS#: 3860902 Requestor: FOLLOW UP,USER TWO Priority: ROUTINE Subject: CONFIRM SPELLING OF NAME Action Required By: 03/02/2007 Request Date:03/02/2007 Resp#: 0/1	
[Quit]	
REQUEST FROM QUIT	

Step	Action
8	After pressing <enter>, the Follow Up Response Screen displays:</enter>

FOLLOW UP RES	PONSE	Select One: 0
Pt Nm: LIBRE,NACHO Gender: M DOB: 01/01/2007 Lgl Co: ORANG	CCS#: 386090 GE REG= ACTIVE	, ,
Request Date: 03/02/2007 Follow Up ID: Requestor: FOLLOW UP,USER TWO Action Required By: 03/02/2007 Priori		[Quit]
Primary Addressee: MOMMA LIBRE Patient Contact Phone: (213) 987-4521 Provider:	Other Phone: Telephone:	
Subject: CONFIRM SPELLING OF NAME Comments: IS THE CLIENT'S NAME CORRECT, NAME.	IF NOT GET THE CORREC	CT SPELLING OF
Follow Up By: FOLLOW UP,USER ONE NAME IS SPELLED CORRECT.	Action Taken D	t: 03/02/2007
Notification to: Last Update By: FOLLOW UP,USER TWO	Accepted Dt Date:	: 03/02/2007

Action Menu The Follow Up Response Screen has four commands:

Se I	ect One:
(?)	Save
()	Print
()	Cance I
[Qui	it]

Command	Action
Save	Select <i>Save</i> from action menu to save data entered.
	Save will save the record and bring user to the <i>Follow Up Response Branch Menu</i> .
Print	Select <i>Print</i> will take user to the <i>Print Device</i> page to print and
	then to the Follow Up Response Branch Menu.
Cancel	Select Cancel will take user back to previous page. Cancel will
	not save the request but bring user back to the Respond to Follow
	Up menu.
Quit	Select Quit will take user back to screen. Quit will bring user
	back to the Follow Up Response screen to continue with data
	entry.

Branch Menu

The system shall send the user to the Follow Up Request Branch Menu under the following condition:

- Save is selected
- Print is selected

FOLLOW UP RESPONSE BRANCH MENU	
Pt Nm: PIE,CHERRY CCS#: 3860903 CIN: 37431741 Gender: F DOB: 03/01/2002 LGL CO: SACRAMENTO REG= ACTIVE MED= E F/R=	
() Narrative for Follow Up Response () Mail Message for Follow Up Response () Select Option Menu () Follow Up Menu	

If Not Finish with Request

As stated earlier, if you are not completely finish with your response and would still like to work on the case at a later time, leave the "Action Taken Dt" field blank.

To Restore Request Back in Respond to Follow Up Request (Pending Status) If you would like to put request back to pending status (*Respond to Follow Up Request*), you must do so under the Edit Follow Up Requests and Responses.

Step	Action
1	Type "F" for Follow Up from the Primary Menu
2	Press <enter></enter>
	Type "ED" for Edit Follow Up Requests and Responses from the
3	Follow Up option
4	Press <enter></enter>
5	Type "AS" for As Responder or use the up arrow
6	Press <enter></enter>
7	Search Results display
8	Select Client's record
9	Press <enter></enter>
10	Follow Up Response Screen appears
11	Arrow down to the Action Taken Dt field
12	Use function <f7> to clear date in field</f7>
13	Also, if user wants to, he/she can arrow down to the comment section and edit comments or delete response comments.
14	Use function <f2> for Action Menu</f2>
15	Select <save></save>
16	Press <enter></enter>

Once you delete date from *Action Taken Dt* field, the system will send the request back to the *Respond to Follow Up Request*.

Edit Follow Up Requests and Responses: As Requestor

The *Edit Follow Up Requests and Responses* will allow a user to edit his/her own follow up requests and responses. This section will focus on editing the request as the requestor, the person that generated the request.

As the Requestor

Under the *Edit Follow Up Requests and Responses* as the requestor, user can only edit requests. A request also has to be in *Responded To* status. Any other status; such as, *Complete, Delete,* or *No Action* will be found under *Follow Up History*.

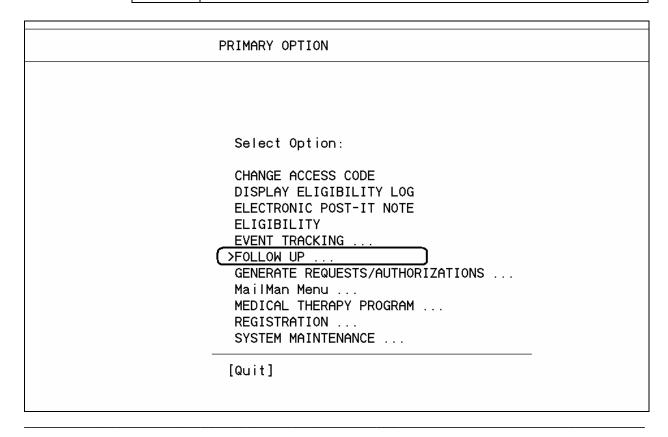
Requestor Can Edit Following Fields:

As the requestor, user can view and edit his/her own requests. Requestor can edit the following fields:

- Action Required by
- Priority
- Provider
- Subject
- Comments
- Request Follow Up To or Follow Up By
- Notification to

To Access Edit Follow Up Requests and Responses

Step	Action
1	Type "F" for Follow Up from the Primary Menu
2	Press <enter></enter>



To Edit Follow Up Requests and Responses: As Requestor

Step	Action	
	Type "ED" for Edit Follow Up Requests and Responses from the	
3	Follow Up option	
4	Press <enter></enter>	

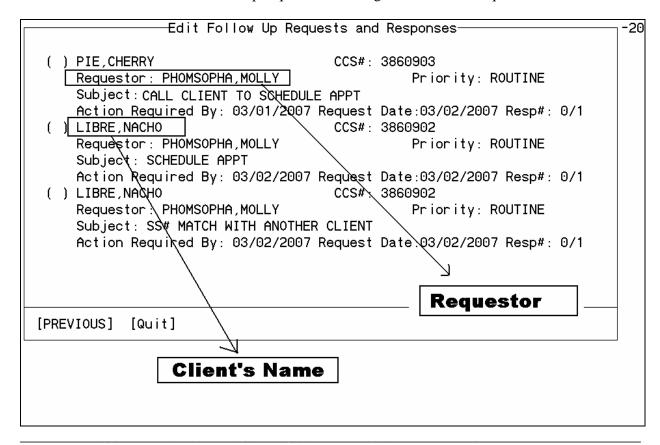
FOLLOW UP	
Select Option: Select Option:	
[Quit]	

Edit Follow Up Requests and Responses Select Option

After pressing <Enter>, the Edit Follow Up Requests and Responses Select Option appears:

Step	Action
1	Type "A" for As Requestor or use the up arrow
2	Press <enter></enter>

Once user select *<As Requestor>* and press *<Enter>*, the system will display all results for follow up requests that user generated as the requestor.



Follow Up Request Screen

Select the client's record and if no user has taken action on request that he/she sent out; the system will display the Follow Up Request screen.

CMSAT	FOLLOW UP REQUEST	
Pt Nm: PIE,CHERRY Gender: F DOB: 03/01/20	02 Lg1 Co: SACRAMENTO REG:	CCS#: 386090 () Delete = ACTIVE () Print () Cancel
Requestor: FOLLOW UP,US	7 Follow Up ID: 0307-000 ER ONE 01/2007 Priority: ROUTIM	18 Stat [Quit]
Primary Addressee: Patient Contact Phone: Provider:	(916) 999-9999 Other Pho	Follow Up Request Screen
2PM TO 4PM. A	SCHEDULE APPT O SCHEDULE APPT. BEST TIME LSO ASK TO SPEAK WITH FATH S NOT SPEAK ENGLISH.	
 Request Follow Up to: F 	OLLOW UP,USER FOUR OLLOW UP,USER TWO	
Notification to: FOLLOW	UP,USER THREE	
Last Update By: F0LL0W	UP,USER ONE	Date: 03/01/2007

Or the system will display:

Follow Up Response Screen

Follow Up Response Screen From search result select client and the system will display the *Follow Up Response* screen if the request has been responded by at least one user.

FOLLOW UP RESPONSE

Pt Nm: PIE,CHERRY CCS#: 3860903 CIN: 37431741A 4

Request Date: 03/01/2007 Follow Up ID: 0307-000019 | Status: RESPONDED TO

Requestor: FOLLOW UP, USER ONE

Action Required By: 03/01/2007 Priority: ROUTINE

Primary Addressee: BERRY AND COCO PIE

Patient Contact Phone: (916) 999-9999 Other Phone:

Provider: Telephone:

Subject: CALL CLIENT TO SCHEDULE APPT

Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR

2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE

BERRY PIE DOES NOT SPEAK ENGLISH.

Follow Up By: FOLLOW UP, USER THREE Action Taken Dt: 03/01/2007

CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR

INTERVIEW ON 4/5/07.

Notification to: FOLLOW UP,USER FIVE Accepted Dt:

Last Update By: FOLLOW UP,USER TWO Date: 03/01/2007

If user responded to the request, a pop-up comment box will appear inside the *Follow Up Response Screen* when user arrow down to the *Follow Up By* field. The comment box will have the following information: Response #, Follow Up By, and Comments. Press <Enter> or <Quit> will take user to the next comment box or to the next Follow Up By user's name.

CMSFU-40 Response#: 2 Follow Up By: FOLLOW UP, USER TWO 1741A 4 F/R= E Comments: CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER. Ε [Quit] Primary Addressee: Follow Up Response Patient Contact Phone: Provider: Comments Box Subject: CALL CLIENT TO Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH. Follow Up By: FOLLOW UP, USER TWO Action Taken Dt: 03/01/2007 CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER. Notification to: Accepted Dt: Last Update By: FOLLOW UP,USER ONE Date: 03/01/2007

Follow Up Response Screen with Response Comments Box

If there are no more responses left to view, the system will take user to the Follow Up By field. The field will be blank to allow editing.

Requestor can edit following fields: Action Required by, Priority, Provider, Subject, Comments, Follow Up By, and Notification to.

Requestor can delete individuals or add individuals at any point if that individual has not taken action on request.

To Add New User to Follow Up by Field or Notification to Field

Step	Action	
	Use <f1> to bring up User Pick List or type Last Name, First Name of</f1>	
1	User	
2	Press <enter></enter>	

	FOLIABLED DECRANCE			
Select One:	FOLLOW UP RESPONSE	Select One: 0		
FOLLOW UP, USER FIVE	·	() Save -		
FOLLOW UP, USER FOUR	CCS#: 386090	() Print		
FOLLOW UP, USER ONE	Lg Co: SACRAMENTO REG= ACTIVE	() Cancel		
>FOLLOW UP, USER THREE	l <u> </u>			
-	Follow Up ID: 0307-000019 Stat	[Quit]		
FOLLOW UP,USER TWO	ONE	[4411]		
[Quit]	2007 Priority: ROUTINE			
\ <u> </u>	1			
Primary Addressee: BE				
Patient Contact Phone: (9	16) 999-9999 Other Phone:			
Provider:	Te l ephone :			
Subject: CALL CLIENT TO SC	CHEDULE APPT			
*	SCHEDULE APPT. BEST TIME TO CALL 8AN	TO 10AM OR		
	O ASK TO SPEAK WITH FATHER (COCO PIE			
	·) BECHUSE		
BERRY PIE DUES	NOT SPEAK ENGLISH.			
L 				
Follow Up By: follow '	Action Taken Di	i:		
Notification to: Accepted Dt:				
Last Update By: FOLLOW UP	•	03/02/2007		
201 opunto 5/1 1 ozzon ol 700zli 1110				

To Delete User to Follow Up by Field or Notification to Field

Step	Action	
1	Use <f7> to clear the field</f7>	
2	Press <enter></enter>	

CMS Net User Guide and Reference

At this point, if user does not want to notify another user about existing request, press <Enter> to by pass the field.

From the *Notification to* field when finish tab to the end or <F2> to bring up action menu. This will allow user to *Save*, *Delete*, *Print*, *or Cancel*.

To Edit Follow Up Requests and Responses: By Patient

> As Requestor

Step	Action	
1	Select By Patient	
2	Press <enter></enter>	
	Auto pop-up will display two more options: As Requestor/ As	
3	Responder	
4	Select As Requestor	
5	Press <enter></enter>	

Edit Follow Up Requests and Responses

SELECT OPTION:

AS REQUESTOR
AS RESPONDER

*BY PATIENT > *AS REQUESTOR
BY ACTION REQD BY DT AS RESPONDER
QUIT

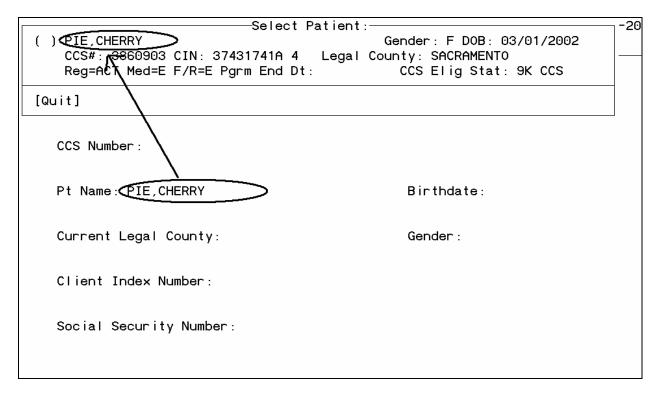
Identify Patient After pressing <Enter>, the Patient Identification Screen, CMSPI-10 appears:

PATIENT IDENTIFICATION FOR: Edit Follow Up Requests and Responses		
Enter one of the following identifiers:		
CCS Number:		
Pt Name: PIE,CHERRY	Birthdate:	
Current Legal County:	Gender:	
Client Index Number:		
Social Security Number:		

For instructions on identifying patient, see the Patient ID section of this manual.

Search Results

From search result, select client's record.



After client selection, the Follow Up Request Screen or Follow Up Response Screen will appear:

Follow Up Request Screen

Select the record and the system will display the Follow Up Request screen if no user has taken action on request that he/she sent out.

CMSAT	FOLLOW UP REQUE	ST	Select One:
Pt Nm: PIE,CHERRY Gender: F DOB: 03/01/20	02 LgI Co: SACRAMENTO	CCS#: 386090 EG= ACTIVE	() Save () Delete () Print () Cancel
Requestor: FOLLOW UP,US	7 Follow Up ID: 0307-0 ER ONE 01/2007 Priority: ROU		[Quit]
Primary Addressee: Patient Contact Phone: Provider:	(916) 999-9999 Other	Phone :	Up Request Screen
Subject: CALL CLIENT TO SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECUASE BERRY PIE DOES NOT SPEAK ENGLISH.			
Request Follow Up to: F F	OLLOW UP,USER FOUR OLLOW UP,USER TWO		
Notification to: FOLLOW UP,USER THREE			
Last Update By: F0LL0W	UP,USER ONE	Date:	03/01/2007

Or the system will display:

Follow Up Response Screen From search result select client and the system will display the *Follow Up Response* screen if the request has been responded by at least one user.

FOLLOW UP RESPONSE

Pt Nm: PIE,CHERRY CCS#: 3860903 CIN: 37431741A 4

Request Date: 03/01/2007 Follow Up ID: 0307-000019 Status: RESPONDED TO

Requestor: FOLLOW UP, USER ONE

Action Required By: 03/01/2007 Priority: ROUTINE

Primary Addressee: BERRY AND COCO PIE

Patient Contact Phone: (916) 999-9999 Other Phone: Follow Up Response Screen

Provider: Telephone:

Subject: CALL CLIENT TO SCHEDULE APPT

Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR

2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE

BERRY PIE DOES NOT SPEAK ENGLISH.

Follow Up By: FOLLOW UP, USER THREE Action Taken Dt: 03/01/2007

CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR

INTERVIEW ON 4/5/07.

Notification to: FOLLOW UP,USER FIVE Accepted Dt:

Last Update By: FOLLOW UP, USER TWO Date: 03/01/2007

When done <F2> will display action menu. Select <*Save*> from the action menu to save changes to request and system will bring user to the *Follow Up Request Branch Menu*.

To Edit Follow Up Requests and Responses: By Action Reqd By Dt > As Requestor

Step	Action
1	Select <by action="" by="" dt="" reqd=""></by> from Select Option
2	Press <enter></enter>
	Auto pop-up will display two more options: As Requestor/ As
3	Responder
4	Select < As Requestor>
5	Press <enter></enter>

Edit Follow Up Requests and Responses

SELECT OPTION:

AS REQUESTOR
AS RESPONDER
BY PATIENT >

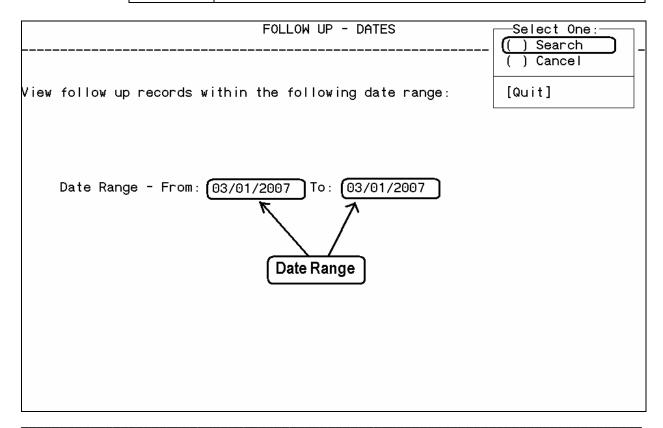
*BY ACTION REQD BY DT >AS REQUESTOR
QUIT

AS RESPONDER

Follow Up-Dates Screen After pressing <Enter>, the Follow Up- Dates Screen will appear:

ten Action

Step	Action
1	Enter the date range in the following fields: "From" and "To".
2	Press <enter></enter>
3	Select <search></search> from Action Menu
4	Press <enter></enter>



Step	Action		
5	Select Record		
6	Press <enter></enter>		

Edit Follow Up Requests and Responses
(?) PIE,CHERRY CCS#: 3860903
Requestor: FOLLOW UP,USER ONE Priority: ROUTINE
Subject REQUESTING FXTRA INFORMATION
Action Required By: 03/01/2007 Request Date:03/02/2007 Resp#: 0/1
[Quit]

Follow Up Request Screen

After search result, select client and the system will display the Follow Up Request screen if no user has responded to the request.

CMSAT	FOLLOW UP REQUES	ST [Select One:
Pt Nm: PIE,CHERRY Gender: F DOB: 03/01/2002			() Save () Delete () Print () Cancel
Request Date: 03/01/2007 Requestor: FOLLOW UP,USER Action Required By: 03/01/	ONE		[Quit]
Primary Addressee: BER Patient Contact Phone: (91 Provider:	6) 999-9999 Other F	Phone : Follow	Up Request Screen
Request Follow Up to: FOLL FOLL	OW UP,USER FOUR OW UP,USER TWO		
Notification to: FOLLOW UP	USER THREE		
Last Update By: FOLLOW UP,	USER ONE	Date:	03/01/2007

Or the system will display:

Follow Up Request Screen From search result select client and the system will display the *Follow Up Response* screen if the request has been responded by at least one user.

FOLLOW UP RESPONSE

Pt Nm: PIE,CHERRY CCS#: 3860903 CIN: 37431741A 4

Gender: F DOB: 03/01/2002 Lg| Co: SACRAMENTO REG= ACTIVE MED= E F/R= E

Request Date: 03/01/2007 Follow Up ID: 0307-000019 Status: RESPONDED TO

Requestor: FOLLOW UP, USER ONE

Action Required By: 03/01/2007 Priority: ROUTINE

Primary Addressee: BERRY AND COCO PIE

Patient Contact Phone: (916) 999-9999 Other Phone: [Provider: Telephone:

Subject: CALL CLIENT TO SCHEDULE APPT

Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR

2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE

BERRY PIE DOES NOT SPEAK ENGLISH.

Follow Up By: FOLLOW UP, USER THREE Action Taken Dt: 03/01/2007

CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR

INTERVIEW ON 4/5/07.

Notification to: FOLLOW UP,USER FIVE Accepted Dt:

Last Update By: FOLLOW UP,USER TWO Date: 03/01/2007

After editing, <F2> will bring up Action Menu.

S∈	lect One:—	
()	Save	
()	Delete	
()	Print	
()	Cancel	
[Qu	it]	
I		

Command	Action		
Save	Select <i><save></save></i> from action menu to save data entered.		
Print	Select <i><print></print></i> will take user to the <i>Print Device</i> page to print		
	and then to the Follow Up Request Branch Menu.		
Delete	Select <i><delete></delete></i> will delete the request.		
Cancel	Select <i><cancel></cancel></i> will take user back to previous page. <i>Cancel</i>		
	will not save the request but bring user back to the Edit Follow		
	Up Requests and Responses Menu		
Quit	Select < Quit> will take user back to screen.		

Follow Up Request Branch Menu

The system shall send the user to the Follow Up Request Branch Menu under the following condition:

- Save is selected
- Print is selected
- Delete is selected
- Complete is selected

F	OLLOW	UP REQUEST	BRANCH ME	NU		
Pt Nm: PIE,CHERRY			CCS#:	3860903	CIN: 374	31741A 4
Gender: F DOB: 03/01/2002 L	.GL CO:	: SACRAMENTO	REG= ACT	IVE	MED= E	F/R= E
(?) Nan	rative for	Follow Up	Requests	S	
. () Mai	il Message f	or Follow	Up Reque	ests	
		it Follow Up llow Up Menu		and Res	ponses	
	,	он	•			

Branch Menu

From Branch Menu:

- Select <Narrative for Follow Up Request> will allow user to generate a narrative for request.
- Select <Mail Message for Follow Up Request> will allow user to mail message.
- Select <Edit Follow Up Requests and Responses> will take user the Edit Follow Up Requests and Responses menu.
- Select <Follow Up Menu> will take user to the Follow Up menu.

Completing a Follow Up Request When a request has been responded by all users, you can complete the requests under the following conditions:

- Status of request is Responded To
- All users have responded to follow up request
- The user is the person that created the request

NOTE: If a request has not been responded by all users, the *Complete* option will not appear in the action menu for user to select.

—- <u></u> :	Se	lect One:				
()	Save				
()	Delete				
()	Print				
()	Complete				
()	Cance I				
[Quit]						

Action Menu with Compete Option

CMSAT	FOLLOW UP RES	PONSE		Select One:	0
Pt Nm: PIE,CHERRY Gender: F DOB: 03/01	/2002 Lgl Co: SACRA		386090 IVE	() Save () Delete () Print (() Complete	- ا د
Request Date: 03/02/ Requestor: PHOMSOPHA Action Required By:	, MOLLY		Stat	() Cancel 1	<u>۲</u>
Primary Addresse Patient Contact Phor Provider:	e: BERRY AND COCO P ne: (916) 999-9999		L	nplete to complete requ	est
Subject: SENT OUT PS Comments: CALL CLIEN RESIDES IN		ESS IS CORRECT	AND IF	CLIENT	
Follow Up By: FOLLOW VERIFIED CLIENT'S AD			Taken Di	t: 03/02/2007	
Notification to: Last Update By: FOLL	.OW UP,USER TWO	Acce	pted Dt Date:	: 03/02/2007	

Revised 04/11/2007

To Complete a Follow Up Request

Step	Action		
1	Use function <f2> for Action Menu</f2>		
2 Select <complete> from Action Menu</complete>			
3	Press <enter></enter>		

After user completes the follow up request, it will be sent to the *Follow Up History* after the status change.

Auto Generated Narrative After user completes a request, the system will auto generate a narrative stating, "The requestor has completed the request".

02/16/2007 ENTERED BY: LAST NAME, FIRST NAME

SUBJ: FOLLOW UP RESPONSE

Follow Up ID: 0207-000003 Request Date: 02/15/2007 Action

Required by Date: 02/15/2007 The requestor has completed the

request Follow Up Comments: UPDATE PSA INFORMATION

Deleting a Follow Up Request

User can delete a request at any time if user was the person that generated the follow up request. If user decides to delete a request a pop-up message "Are you sure you want to change the status to delete?" will first appear.

Are you sure you want to change the status to delete?

(?) YES
() NO

To Delete a Follow Up Request

Action	Action	
1	Select Delete	
2	Press <enter></enter>	
3	Select Yes from Auto Message Box	
4	Press <enter></enter>	

Deleting a Request Will Send the Request to Follow Up History After user deletes the request, system will be sent request to the *Follow Up History*. Request will not be deleted from the system but will remain in *Follow Up History* for viewing, therefore, deleting a request means sending the requests to the *Follow Up History*.

Auto Generated Narrative After user completes a request, the system will auto generate a narrative stating, "The requestor has deleted the request".

02/16/2007 ENTERED BY: LAST NAME, FIRST NAME

SUBJ: Follow Up Request

Follow Up ID: 0207-000003 Request Date: 02/15/2007 Action Required by Date: 02/15/2007 The requestor has deleted the request Subject: PSA UPDATE Follow Up Comments: UPDATE PSA

INFORMATION

Section 4: Edit Follow Up Requests and Responses: As Responder

Edit Follow Up Requests and Responses: As Responder

The *Edit Follow Up Requests and Responses* will allow user to edit follow up requests and responses. User can edit request as the As Responder, As Requestor, By Patient, and By Action Reqd by Dt. This section will focus on editing follow up request as the responder.

As the Responder

As the responder, the user will not be able to view other users' comments but will be able to view or edit his/her own comments.

Under the *Edit Follow Up Requests and Responses* as the responder, user can only edit requests. A request also has to be in *Responded To* status. Any other status; such as, *Complete, Delete,* or *No Action* will be found under *Follow Up History*.

Responder's editable fields:

As the responder, the user can only edit the following fields:

If user is the Follow Up By user:

- Follow Up By
- Action Taken Dt

If user is the Notification To user:

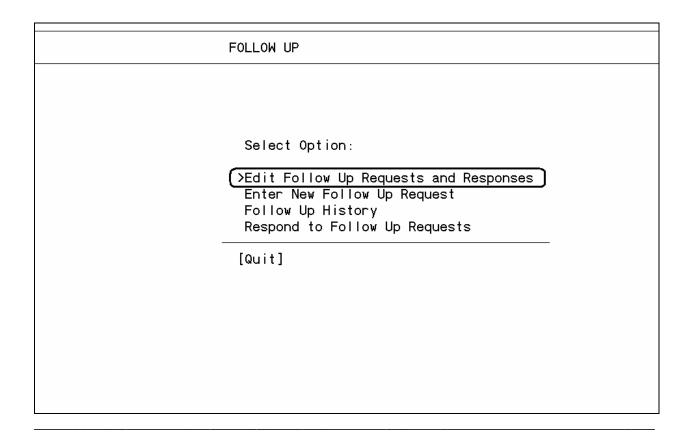
- Notification To
- Accepted Dt

To Edit Follow Up Requests and Responses: As Responder

Step	Action
1	Type "F" for Follow Up from the Primary Menu
2	Press <enter></enter>

PRIMARY OPTION	
Salast Ontion.	
Select Option:	
CHANGE ACCESS CODE	
DISPLAY ELIGIBILITY LOG	
ELECTRONIC POST-IT NOTE	
ELIGIBILITY	
EVENT TRACKING	
(>FOLLOW UP	
GENERATE REQUESTS/AUTHORIZATIONS	
MailMan Menu	
MEDICAL THERAPY PROGRAM	
REGISTRATION	
SYSTEM MAINTENANCE	
[Quit]	

Step	Action
	Type "ED" for Edit Follow Up Requests and Responses from the
3	Follow Up option
4	Press <enter></enter>



Edit Follow Up Requests and Responses Select Option

After pressing <Enter>, the Edit Follow Up Requests and Responses Select Option appears:

Step	Action
1	Type "AS" for As Responder or use the up arrow
2	Press <enter></enter>

Edit Follow Up Requests and Responses

SELECT OPTION:

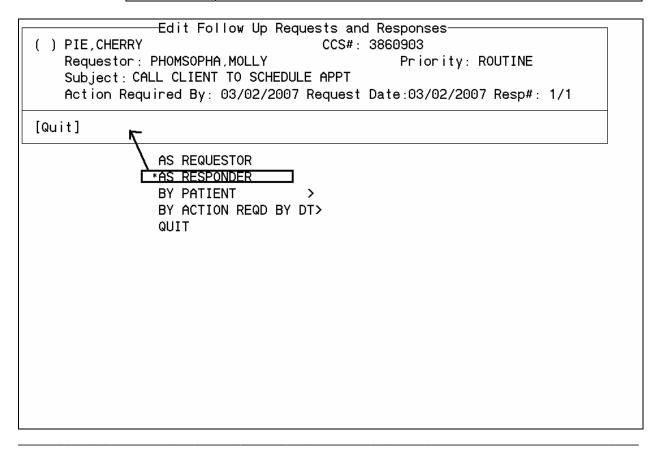
AS REQUESTOR

>AS RESPONDER

BY PATIENT

BY ACTION REQD BY DT>
QUIT

Step	Action
3	Search Results display
4	Select Client's record
5	Press <enter></enter>



Follow Up Response screen display after client selection and at the same time the Follow Up Comments box will auto display on screen for viewing. Press <Enter> to get rid of comment box.

Follow Up Comments:

CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.

37431741A 4 E F/R= E

SPONDED TO

[Quit]

Primary Addressee: BERRY AND COCO PIE

Patient Contact Phone: (916) 999-9999 Other Phone: Provider: Telephone: Follow Up Comments box

Subject: CALL CLIENT TO SCHEDULE APPT

Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR

2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE

BERRY PIE DOES NOT SPEAK ENGLISH.

Follow Up By: FOLLOW UP, USER THREE Action Taken Dt: 03/01/2007

CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR

INTERVIEW ON 4/5/07.

Notification to: Accepted Dt:

Last Update By: FOLLOW UP,USER THREE Date: 03/01/2007

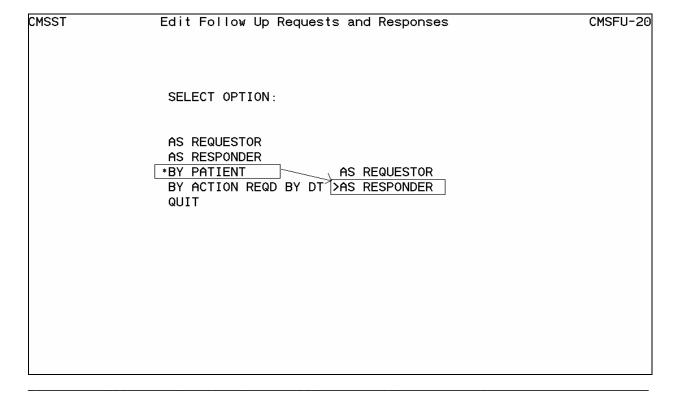
Follow Up Response Screen with Follow Up Comments Box

User can edit response field under the *Follow Up By* and *Action Taken Dt* or if request was sent to user as the *Notification to* person, he/she can edit the *Accepted Dt* field. When done, <F2> will bring up the action menu. Select <*Save*> from the action menu to save changes to request and system will bring user to the *Follow Up Response Branch Menu*.

and Responses: By Patient > As Responder

To Edit Follow Up Requests If user knows the client's name, user can edit follow up requests that he/she took action by doing a client search.

Step	Action
1	Select By Patient
2	Press <enter></enter>
	Auto pop-up will display two more options: As Requestor/ As
3	Responder
4	Select As Responder
5	Press <enter></enter>



Identify Patient After pressing <Enter>, the Patient Identification Screen, CMSPI-10 appears:

CMSA	T PATIENT IDENTIFIC Follow Up History		CMSPI-20
	Enter one of the following identifiers	:	
	CCS Number:		
	Pt Name: PIE,CHERRY	Birthdate:	
	Current Legal County:	Gender:	
	Client Index Number:		
	Social Security Number:		

For instructions on identifying patient, see the Patient ID section of this manual.

System will search for all requests by client's name.

Follow Up History	 −20
() PIE, CHERRY CCS#: 3860903	
Requestor: FOLLOW UP, USER ONE Priority: ROUTINE	
Subject: CALL CLIENT TO SCHEDULE APPT	
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	
() PIE,CHERRY CCS#: 3860903	
Requestor: FOLLOW UP,USER ONE Priority: ROUTINE	
Subject: SCHEDULE APPT	
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	
[A 11]	\dashv
[Quit]	
QUIT	

Follow Up Response

Screen

Select request record and press <Enter>. After pressing <Enter>, the Follow Up

Response Screen appears:

FOLLOW UP RESPONSE

Pt Nm: PIE,CHERRY CCS#: 3860903 CIN: 37431741A 4

Request Date: 03/01/2007 Follow Up ID: 0307-000019 | Status: RESPONDED TO

Requestor: FOLLOW UP, USER ONE

Action Required By: 03/01/2007 Priority: ROUTINE

Primary Addressee: BERRY AND COCO PIE

Patient Contact Phone: (916) 999-9999 Other Phone: Follow Up Response Screen

Provider: Telephone:

Subject: CALL CLIENT TO SCHEDULE APPT

Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR

2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE

BERRY PIE DOES NOT SPEAK ENGLISH.

Follow Up By: FOLLOW UP,USER THREE Action Taken Dt: 03/01/2007

CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR

INTERVIEW ON 4/5/07.

Notification to: FOLLOW UP,USER FIVE Accepted Dt:

Last Update By: FOLLOW UP,USER TWO Date: 03/01/2007

To Edit Follow Up

Requests and Responses: By Action Reqd By Dt >

User can also edit follow up request by Action Required By date.

As Responder

Step	Action
1	Select By Action Reqd by Dt
2	Press <enter></enter>
	Auto pop-up will display two more options: As Requestor/ As
3	Responder
4	Select As Responder
5	Press <enter></enter>

Edit Follow Up Requests and Responses

SELECT OPTION:

AS REQUESTOR AS RESPONDER BY PATIENT

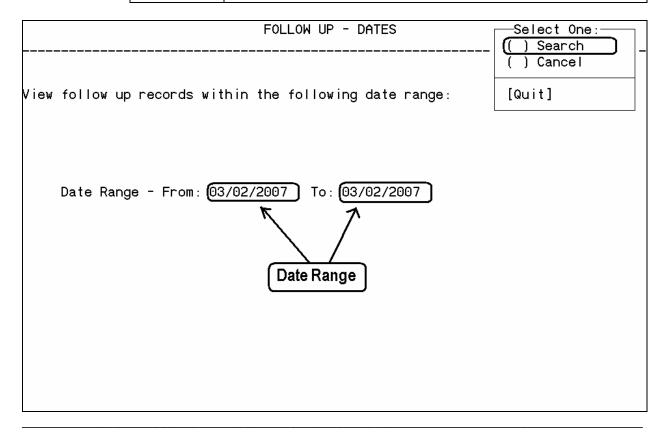
*BY ACTION REQD BY DT AS REQUESTOR QUIT >AS RESPONDER

After selecting the *By Action Reqd by Dt* as *As Responder*, the *Follow Up-Dates* menu will display for user to enter in date range.

Follow Up-Dates Screen

After pressing <Enter>, the Follow Up- Dates Screen will appear:

Step	Action	
1	Enter the date range "From" and "To".	
2	Press <enter></enter>	
3	Select "Search" from the Action Menu	



System will search for all requests base on the date entered.

Step	Action
4	Press <enter></enter>
5	Select Client's record
6	Press <enter></enter>

Edit Follow Up Requests	and Responses—
() PIE,CHERRY CCS#	#: 3860903
Requestor: PHOMSOPHA,MOLLY	Priority: ROUTINE
Subject CALL CLIENT TO SCHEDULE APPT	·
Action Required By: 03/02/2007 Reques	st Date:03/02/2007 Resp#: 1/1
() LIBRE, NACHO CCS#	#: 3860903
Requestor: PHOMSOPHA,MOLLY	Priority: ROUTINE
Subject: SCHEDULE APPT	,
Action Required By: 03/02/2007 Reques	st Date:03/02/2007 Resp#: 0/1
· ·	#: 3860902
Requestor: PHOMSOPHA, MOLLY	Priority: ROUTINE
Subject: SS# MATCH WITH ANOTHER CLIEN	· ·
Action Required By: 03/02/2007 Reques	
, , , , , , , , , , , , , , , , , , , ,	
[Quit]	

After pressing <Enter>, the Follow Up Response screen appears:

CMSAT	FOLLOW UP RESPONSE		Select One:0
Pt Nm: PIE,CHERRY Gender: F DOB: 03/01/2002	Lgl Co: SACRAMENTO F	CCS#: 386090 REG= ACTIVE	() Save () Print () Cancel
Request Date: 03/01/2007 Requestor: FOLLOW UP,USER Action Required By: 03/02,	ONE	L	[Quit]
Primary Addressee: BEF Patient Contact Phone: (9 Provider:	16) 999-9999 Other	Phone : e l ephone :	
Follow Up By: FOLLOW UP,US CALLED CLIENT'S PARENT AND INTERVIEW ON 4/5/07.			
Notification to: Last Update By: FOLLOW UP	USER THREE	Accepted Dt: Date:	03/01/2007

Follow Up Response Branch Menu

When done, <F2> will bring up the action menu. Select "Save" and system will take user to the Follow Up Response Branch Menu.

FOLLOW UP RESPONSE BRANCH MENU				
Pt Nm: PIE,CHERRY Gender: F DOB: 03/01/2002 LGL CO: SACRAM		3860903 CIN: IVE MED= E		
() Mail Messa	for Follow Up age for Follow ow Up Requests Menu	Up Response	3	

If Not Finish with Request

As stated earlier, if you are not completely finish with your request and would like to restore the request back to its previous status, which is "pending" under the *Respond to Follow Up Request*, remove the date from the "Action Taken Dt" field

To Restore Request to Respond to Follow Up Requests

Step	Action
1	Type "F" for Follow Up from the Primary Menu
2	Press <enter></enter>
	Type "ED" for Edit Follow Up Requests and Responses from the
3	Follow Up option
4	Press <enter></enter>
5	Type "AS" for As Responder or use the up arrow
6	Press <enter></enter>
7	Search Results display
8	Select Client's record
9	Press <enter></enter>
10	Follow Up Response Screen appears
11	Arrow down to the Action Taken Dt field
12	Use function <f7> to clear date in field</f7>
13	Also, if user wants to, he/she can arrow down to the comment section and edit comments or delete response comments.
14	Use function <f2> for Action Menu</f2>
15	Select <save></save>
16	Press <enter></enter>

Once you delete date from *Action Taken Dt* field, the system will send the request back to the *Respond to Follow Up Request*.

Section 5: Follow Up History

Follow Up History

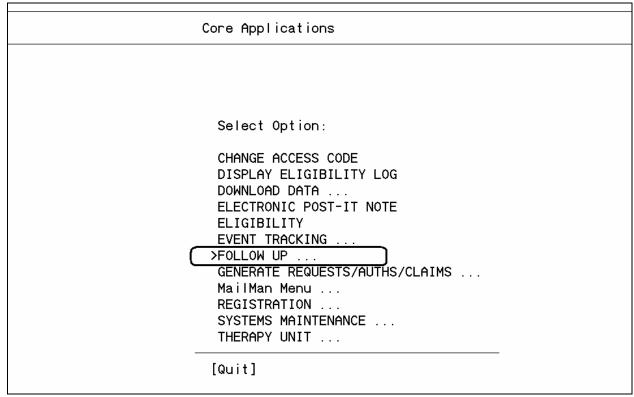
User can view history of follow up requests in the Follow Up History. User will have the options to search for requests that are in *Complete, Deleted* or in *No Action* status by the following options: *As Requestor, As Responder, By Patient, or By Action Regd by Dt.*

View Only

Both Requestor and Responder can only view requests in the *Follow Up History* that are in *Complete, Deleted* or in *No Action* Status.

To Access Follow Up History

Step	Action
1	Type "F" for Follow Up from Primary Option
2	Press <enter></enter>



Step Action Type "**F**" for **Follow Up History** from Follow Up Menu Press <Enter> 3

FOLLOW UP	CMSMP-16
Select Option: Edit Follow Up Requests and Responses Enter New Follow Up Request >Follow Up History Respond to Follow Up Requests [Quit]	

4

Follow Up **History Select**

After pressing <Enter>, the Follow Up History Select Option appears:

Option

Follow Up History

SELECT OPTION:

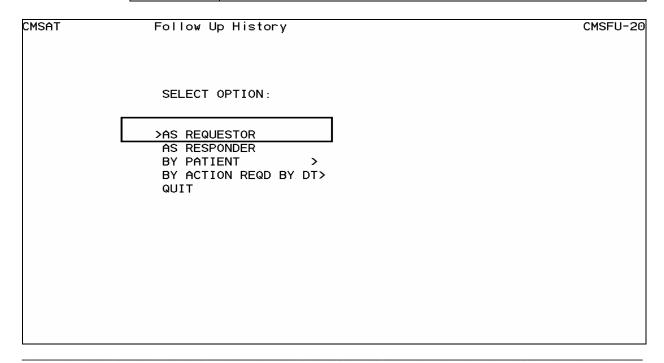
AS REQUESTOR AS RESPONDER BY PATIENT

*BY ACTION REQD BY DT >AS REQUESTOR QUIT

AS RESPONDER

To Access Follow Up History: As Requestor User can view follow up request history by selecting <As Requestor>. The system will search and list all follow up requests that user generated.

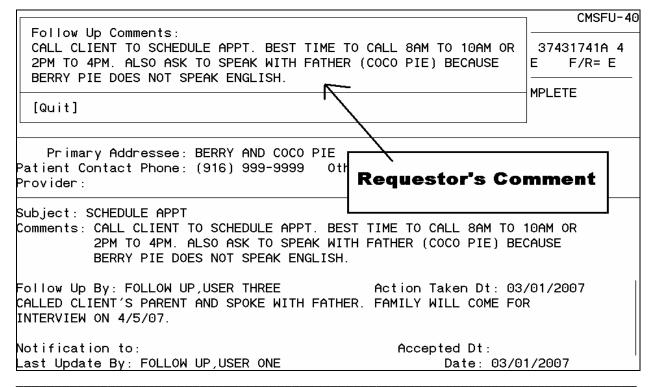
Step	Action
1	Type "AS" for As Requestor or use the up arrow
2	Press <enter></enter>



Step	Action
3	Search Results display
4	Select Client's record
5	Press <enter></enter>

Follow Up History	-20
(_) PIE,CHERRY CCS#: 3860903	
Requestor: FOLLOW UP, USER ONE Priority: ROUTINE	
Subject: CALL CLIENT TO SCHEDULE APPT	
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	
(<u>) PIE, CHERRY</u> <u>CCS</u> #: 3860903	
<pre>Requestor: FOLLOW UP,USER ONE</pre> <pre>Priority: ROUTINE</pre>	
Subject: SCHEDULE APPT	
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	
[Quit]	
QUIT	

After pressing <Enter>, the Follow Up History Screen appears:



Follow Up Follow Up History screen display after client selection and

Follow Up Follow Up History screen display after client selection and at the same time the Follow Up Comments box auto displays on screen for viewing. Press <Enter> to get rid of comment box.

Follow Up Comments:

CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.

[Quit]

Date: 03/01/2007

Follow Up Response

Last Update By: FOLLOW UP, USER ONE

After the follow up comments box displays, an auto follow up response comments box will appear. The response comments box will have the following **Comments Box** information: Response #, Follow Up By, and Comments.

CMSFU-40 Response#: 2 Follow Up By: FOLLOW UP, USER TWO 1741A 4 F/R= E Comments: CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER. Ε [Quit] Primary Addressee: E Follow Up Response Patient Contact Phone: Provider: **Comments Box** Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH. Follow Up By: FOLLOW UP,USER TWO Action Taken Dt: 03/01/2007 CALL CLIENT TO SCHEDULE APPT. FATHER WILL BE COMING IN WITH MOTHER. Notification to: Accepted Dt:

Press <Enter> to take user to the next user's response or if there are no more responses, comment box will disappear.

FOLLOW UP HISTORY

Pt Nm: PIE,CHERRY CCS#: 3860903 CIN: 37431741A 4

Gender: F DOB: 03/01/2002 LgI Co: SACRAMENTO REG= ACTIVE MED= E F/R= E

Request Date: 03/01/2007 Follow Up ID: 0307-000019 Status: COMPLETE

Requestor: FOLLOW UP,USER ONE

Action Required By: 03/01/2007 Priority: ROUTINE

Primary Addressee: BERRY AND COCO PIE

Patient Contact Phone: (916) 999-9999 Other Phone: Provider: Telephone:

Subject: SCHEDULE APPT

Comments: CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR

2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE

BERRY PIE DOES NOT SPEAK ENGLISH.

Follow Up By: FOLLOW UP, USER THREE Action Taken Dt: 03/01/2007

CALLED CLIENT'S PARENT AND SPOKE WITH FATHER. FAMILY WILL COME FOR

INTERVIEW ON 4/5/07.

Notification to: Accepted Dt:

Last Update By: FOLLOW UP,USER ONE Date: 03/01/2007

Follow Up History Screen

Revised 04/11/2007

To Access Follow Up History: As Responder User can view follow up request history by selecting <As Responder>. The system will search and list all results for follow up requests that user took action.

Step	Action
1	Type "AS" for As Responder or use the up arrow
2	Press <enter></enter>

SELECT OPTION:

AS REQUESTOR

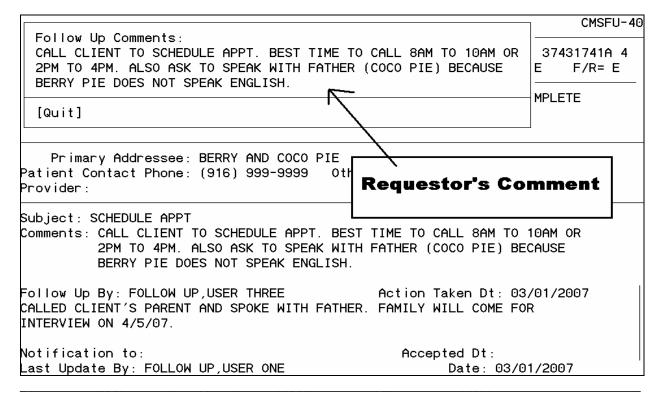
*AS RESPONDER

BY PATIENT >
BY ACTION REQD BY DT>
QUIT

Step	Action
3	Search Results display
4	Select Client's record
5	Press <enter></enter>

Follow Up History	 -20
() PIE,CHERRY CCS#: 3860903	
Requestor: FOLLOW UP,USER ONE Priority: ROUTINE	
Subject: CALL CLIENT TO SCHEDULE APPT	
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	
()(PIE,CHERRY CCS#: 3860903	
Requestor: FOLLOW UP, USER ONE Priority: ROUTINE	
Subject: SCHEDULE APPT	
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	
110 t 1011 110 qu'il du By : 0070 172007 110 quos t Buto :0070 172007 110 sp. : 272	
[Quit]	
[wait]	
QUIT	
4021	

After pressing <Enter>, the Follow Up History Screen appears:



Follow Up Follow Up History screen display after client selection and at the same time the

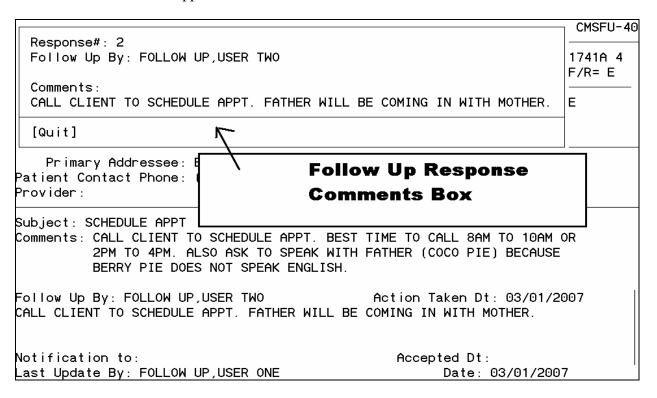
Comments Box Follow Up Comments box auto displays on screen for viewing. Press <Enter> to get rid of comment box.

Follow Up Comments:

CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.

[Quit]

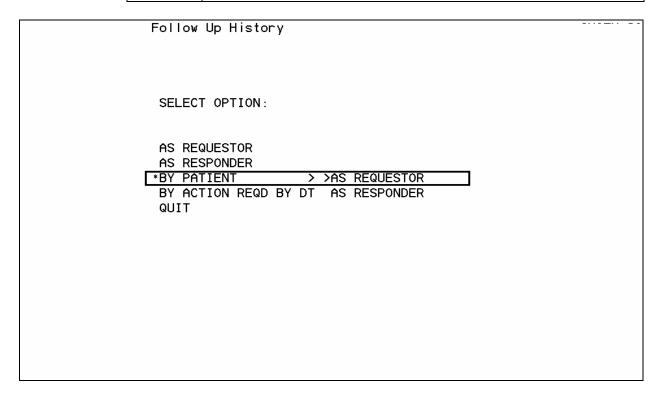
Follow Up Response Comments Box After the follow up comments box display, an auto follow up response comments box will appear. The response comments box will have the following information: Response #, Follow Up By, and Comments. Press <Enter> to take user to the next user's response or if there are no more responses, comment box will disappear.



When finish viewing request, tab to the end or <F2> to bring up action menu. This will allow user to *Print, Cancel, or Quit.*

To Access Follow Up History: By Patient > As Requestor User can also view request history by client search. To view request history of a request that user generated, select <As Requestor>.

Step	Action
1	Select By Patient from Follow Up History select option
2	Press <enter></enter>
	A pop-up will display two more options: As Requestor/ As
3	Responder
4	Select As Requestor
5	Press <enter></enter>

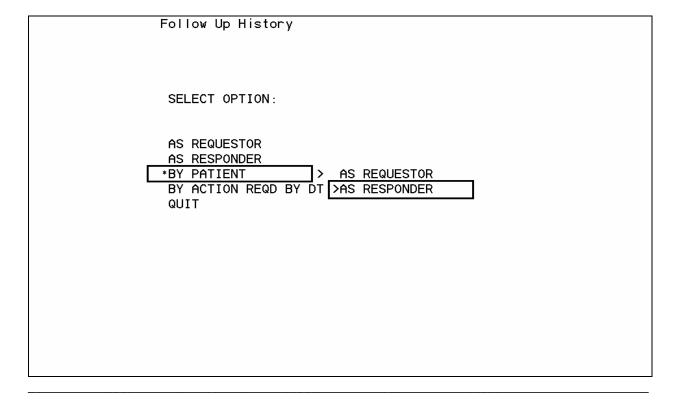


Or the system displays:

To Access Follow Up History: By Patient > As Responder

User can also view request history by client search. To view request history of a request that user took action, select <As Responder>.

Step	Action
1	Select By Patient from Follow Up History select option
2	Press <enter></enter>
	Auto pop-up will display two more options: As Requestor/ As
3	Responder
4	Select As Responder
5	Press <enter></enter>



Identify Patient After selecting either *As Requestor* or *As Responder*, the Patient Identification Screen, CMSPI-10 appears:

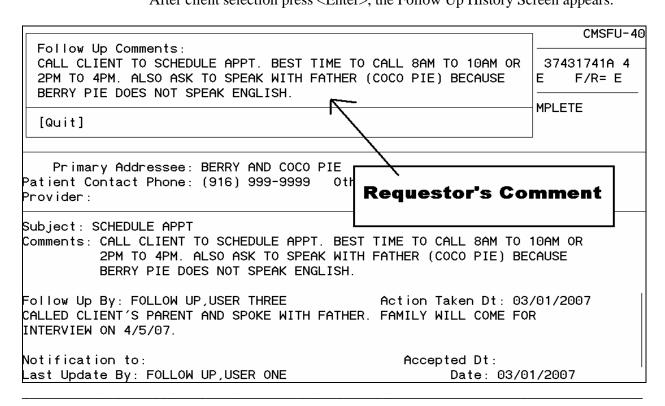
CMSA [*]	T PATIENT IDENTIFICA Follow Up History	TION FOR:	CMSPI-20
	Enter one of the following identifiers:		
	CCS Number:		
	Pt Name: PIE,CHERRY	Birthdate:	
	Current Legal County:	Gender :	
	Client Index Number:		
	Social Security Number:		

For instructions on identifying patient, see the Patient ID section of this manual.

Select the client's record from the search results:

Follow Up History-	-20
() PIE,CHERRY CCS#: 3860903	
Requestor: FOLLOW UP,USER ONE Priority: ROUTINE	
Subject: CALL CLIENT TO SCHEDULE APPT	
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	
() PIE,CHERRY CCS#: 3860903	
Requestor: FOLLOW UP, USER ONE Priority: ROUTINE	
Subject: SCHEDULE APPT	
Action Required By: 03/01/2007 Request Date:03/01/2007 Resp#: 2/2	
[A : 1]	
[Quit]	
QUIT	
WOII	

After client selection press <Enter>, the Follow Up History Screen appears:



Follow Up

Follow Up History screen display after client selection and at the same time the **Comments Box** Follow Up Comments box auto displays on screen for viewing. Press <Enter> to get rid of comment box.

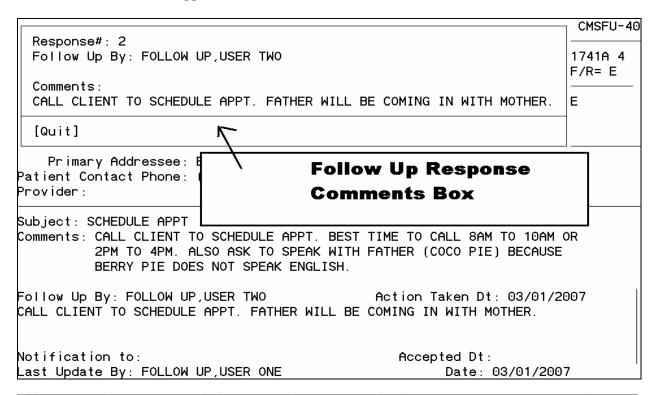
Follow Up Comments:

CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.

[Quit]

Follow Up Response Comments Box

After the follow up comments box displays, an auto follow up response comments box will appear. The response comments box will have the following information: Response #, Follow Up By, and Comments. Press <Enter> to take user to the next user's response or if there are no more responses, comment box will disappear.



To Access Follow Up History: By Action Reqd By Dt > As Requestor User can also view request history by action required by date search as the requestor.

Step	Action
	Select <by action="" by="" dt="" reqd=""></by> from Follow Up History Select
1	Option
2	Press <enter></enter>
	Auto pop-up will display two more options: As Requestor/ As
3	Responder
4	Select < As Requestor>
5	Press <enter></enter>

*				F
	AS BY	AS	SE	οl
<u>′ 1</u>		S 1	ELI	Т
٩C		RE	ΞC	ЭW
		QL	Т	L
		JES	OF	Jр
		ST	РТ	Н
		-o	·I	ł i :
EQ	R	R	ON	st
D			l:	or
В				^у
Υ				
	,			
	>			
RE RE				

Or the system displays:

To Access Follow Up History: By Action Reqd By Dt > As Responder

User can also view request history by action required by date search as the responder.

Step	Action	
	Select <by action="" by="" dt="" reqd=""></by> from Follow Up History Select	
1	Option	
2	Press <enter></enter>	
	Auto pop-up will display two more options: As Requestor/ As	
3	Responder	
4	Select < As Responder >	
5	Press <enter></enter>	

SELECT OPTION:

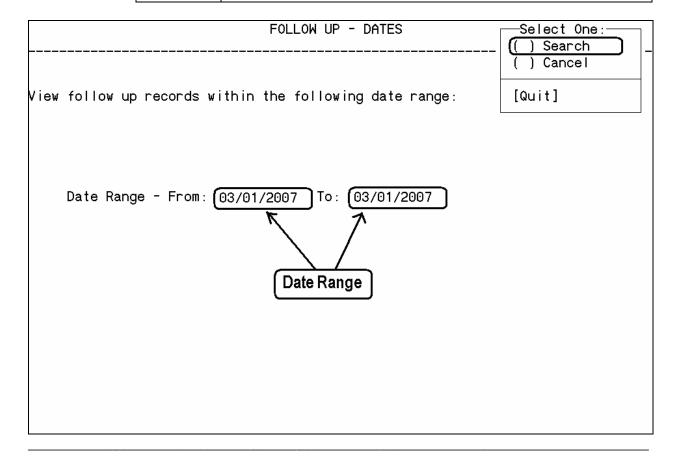
AS REQUESTOR
AS RESPONDER
BY PATIENT >

*BY ACTION REQD BY DT] AS REQUESTOR
QUIT |>AS RESPONDER

Follow Up-Dates Screen

After selecting to view history of request *As Requestor* or *As Responder* press <Enter>, the Follow Up- Dates Screen will appear:

Step	Action
1	Enter the date range in the following fields: "From" and "To".
2	Press <enter></enter>
3	Select <search></search> from Action Menu
4	Press <enter></enter>

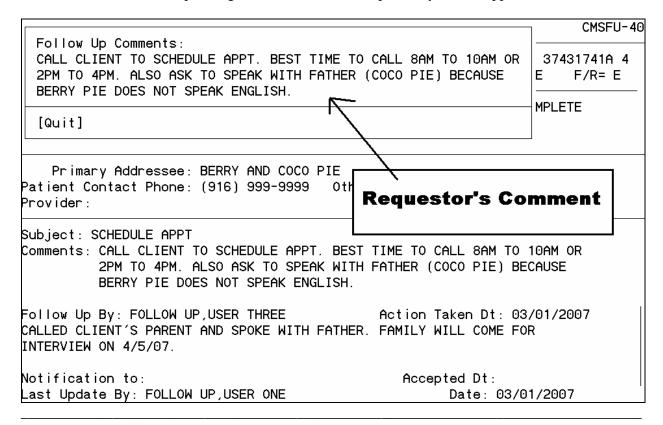


After pressing <Enter>, search result displays:

Step	Action	
5	Select Record	
6	Press <enter></enter>	

		Follow Up Hist	ory—
()	•	: 3860903
	-	Requestor: FOLLOW UP, USER ONE	Priority: ROUTINE
		Subject: CALL CLIENT TO SCHEDULE APPT	•
		Action Required By: 03/01/2007 Reques	t Date:03/01/2007 Resp#: 2/2
()	PIE, CHERRY CCS#	: 3860903
		Requestor: FOLLOW UP,USER ONE	Priority: ROUTINE
		Subject: SCHEDULE APPT	·
	Γ	Action Required By: 03/01/2007 Reques	t Date:03/01/2007 Resp#: 2/2
	_		
[0	ĴИ	it]	

After pressing <Enter>, the Follow Up History Screen appears:



Follow Up

Follow Up History screen display after client selection and at the same time the **Comments Box** Follow Up Comments box auto displays on screen for viewing. Press <Enter> to get rid of comment box.

Follow Up Comments:

CALL CLIENT TO SCHEDULE APPT. BEST TIME TO CALL 8AM TO 10AM OR 2PM TO 4PM. ALSO ASK TO SPEAK WITH FATHER (COCO PIE) BECAUSE BERRY PIE DOES NOT SPEAK ENGLISH.

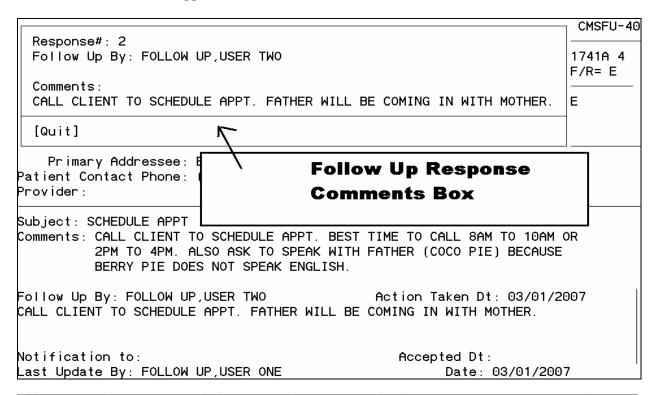
[Quit]

106 This guideline is for training and internal use only.

Revised

Follow Up Response Comments Box

After the follow up comments box displays, an auto follow up response comments box will appear. The response comments box will have the following information: Response #, Follow Up By, and Comments. Press <Enter> to take user to the next user's response or if there are no more responses, comment box will disappear.



After pressing <Enter>, the Follow Up History Screen will appear:

FOLLOW UP HIST	ORY
Pt Nm: PIE,CHERRY Gender: F DOB: 03/01/2002 Lg Co: SACRAM	CCS#: 3860903 CIN: 37431741A 4 ENTO REG= ACTIVE MED= E F/R= E
Request Date: 03/01/2007 Follow Up ID: Requestor: FOLLOW UP,USER ONE Action Required By: 03/01/2007 Priorit	
Primary Addressee: BERRY AND COCO PI Patient Contact Phone: (916) 999-9999 Provider:	
Subject: SCHEDULE APPT Comments: CALL CLIENT TO SCHEDULE APPT. 2PM TO 4PM. ALSO ASK TO SPEAK BERRY PIE DOES NOT SPEAK ENGLI	WITH FATHER (COCO PIE) BECAUSE
Follow Up By: FOLLOW UP,USER THREE CALLED CLIENT'S PARENT AND SPOKE WITH FA INTERVIEW ON 4/5/07.	
Notification to: Last Update By: FOLLOW UP,USER ONE	Accepted Dt: Date: 03/01/2007

Action Menu After viewing request, <F2> will bring up Action Menu.

Select One:		
() Print		
() Cancel		
[Quit]		

Command	Action
Print	Select < Print > will take user to the Print Device page to print and then to the
	Follow Up History Branch Menu.
Cancel	Select < <i>Cancel</i> > will take user back to previous page. <i>Cancel</i> will not save the request but bring user back to the <i>Follow Up History Menu</i>
Quit	Select < Quit > will take user back to screen.

Follow Up History The system shall send the user to the Follow Up History Branch Menu under the following condition:

Branch Menu

• Print is selected

CMSAT	FOLLOW UP REQUEST BRANCH MENU	CMSOM-1
Pt Nm: PIE,CHERRY Gender: F DOB: 03/01/2002	CCS#: 3860903 CIN: 37	431741A 4 F/R= E
	(?) Follow Up History	
	() Follow Up Menu	